



Request for Proposal – Issued 10/22/2019
ORGANIZATIONAL ANALYSIS
Village of Shorewood

Proposal Requested

The Village of Shorewood is requesting proposals from qualified parties for an organizational analysis to be completed for a number of departments and services in the Village.

Project Background and Description

The Village Board has identified an organizational analysis of the Department of Public Works, the Clerk and Customer Service Department, and the Senior Resource Center as a priority for 2019-2020. The Village is seeking a neutral and experienced perspective from a third-party consultant to evaluate and compare Shorewood services with those of other area communities. The analysis will identify recommendations based upon the traditional core services in these areas, estimated costs, current and future trends, compensation and benefits for employees in these areas, and assess service demands of the Shorewood community. The final deliverable will include a full report to be completed in the summer of 2020 prior to the 2021 budget deliberations. Recommendations would offer Village officials to consider short and long-term approaches to prioritize services in these areas to assure services are effectively and sustainably delivered based on best management practices and community service level demands.

The Department of Public Works currently has 20.95 FTEs. A director and assistant director oversee the department and provide a significant amount of administrative support for public work projects. An administrative assistant provides additional administrative and customer service support. There are a variety of services performed in-house: collections (refuse, yard waste, leaves, and other special collections), utilities (water and sewer operations), forestry and horticulture operations, maintenance of public buildings and property, general maintenance of streets (pothole and street repair, streetlights, clean street drains, signage, etc.), snow and ice control operations, equipment and vehicle maintenance, sign and signal maintenance, streetlight system maintenance as well as construction and infrastructure management (streets, alleys, sidewalks, park infrastructure, water distribution system, and sewer collection systems). The Village hires seasonal staff in the summer to help with some of the horticultural work and plantings. The Village contracts out other services (i.e. engineering, curbside recycling collection, curbside organics collection, lawn maintenance, etc.). The Public Works facility is located at 3801 N. Morris Blvd. and is open weekdays from 7:00 a.m. to 3:30 p.m. The DPW recycling center and yard has select hours open on Saturdays that require DPW staff to be present to manage.

The Clerk and Customer Service Department currently has 4.00 FTEs. The Village Clerk is the department head coordinates all election activities, agenda management, Village Board meeting staffing and minute preparation, document management/records retention, maintenance of Village ordinances and resolutions, administration of all business and special event licenses, tax calculation, management of the annual Board of Review, and coordination of volunteer committee appointments. The Deputy Village Clerk / Customer Service Manager assists in all of the above efforts. In addition, this FTE oversees all customer service activities: parking administration, payment processing (permits, utility bills, parking, etc.), early voting, and other customer service inquiries. Two full-time Customer Service Associates help carry out these activities at the customer service desk on the first floor of Village Hall on 3930 N. Murray Ave. Office hours are weekdays from 8:00 a.m. to 4:30 p.m.

The Senior Resource Center (SRC) currently has 1.35 FTEs. The Senior Resource Coordinator works 36 hours per week and manages SRC operations. Activities include daily programming for older adult residents, payment processing and registration, annual celebrations, policy recommendations to foster an age-friendly and intergenerational community, and promotion of external resources to aid senior members. The Senior Resource Center also has a 19-hour per week employee – Program Assistant – who helps with the coordination and setup of SRC activities. SRC staff informs the public about programming through the Village website, Village communication channels (i.e. quarterly Shorewood magazine, weekly online newsletter, social media, etc.), as well as a monthly newsletter specifically for all SRC activities. Office hours are from Monday to Thursday from 10:00 a.m. to 2:00 p.m. in the Village Center on 3920 N. Murray Ave.

The Library currently has 13.5 FTEs. Shorewood Public Library is a member of the Milwaukee County Federated Library System (MCFLS) and as such serves the general population of Milwaukee County residents with no-fee services such as programs, public access computers and WiFi, and physical and digital resources. Under the administration of the Library Board, per Wisconsin State Statute Chapter 43, the Library Director is the department head and sets and manages the budget, oversees facility maintenance including the purchase of furniture, equipment, and general upkeep, oversees the collection and services, and creates policies. The Director also hires, trains and supervises the professional librarians, and the full-time administrative assistant who is responsible for office tasks such as cash receipting and supply ordering. The team of professional librarians is made up of four full-time librarians (Assistant Director, Youth Services Librarian, Young Adult Librarian, Adult and Community Services Librarian), one .75 FTE Reference Services Librarian. The professional librarians provide informational assistance to the public, plan and execute programs for all ages, develop the library’s collection through selection and ongoing analysis, and perform other work that supports the library’s mission, values, and Strategic Plan 2019-2024. In addition to performing these functions, the Assistant Director also supports the administrative tasks of the Director and oversees the library’s circulation department – responsible for customer service and materials management – and hires, trains and supervises the circulation department staff of one full-time Senior Clerk, one full-time Library Associate, two 0.5 FTE Clerks, four 0.35 FTE clerks, and seven 0.25 FTE shelvers. The library is located at 3920 N. Murray Ave. and is open seven days a week from Labor Day until Memorial Day, and six days a week from Memorial Day through Labor Day.

Estimated Timeline

Action items in the estimated timeline are at the discretion of the project manager and are meant to provide a clear understanding of the proposal steps; the schedule is subject to change.

Action Item	Date
RFP Issued	October 22, 2019
Deadline to Schedule Pre-Meeting (if needed)	November 1, 2019
Deadline to Conduct Pre-Meeting (if needed)	November 12, 2019
Proposals Due	November 22, 2019
Interviews and Review of Proposals (if needed)	December 9-20, 2019
Make Recommendation on Contractor	December 27, 2019
Finalize Service Agreement with Contractor	January 10, 2020
Village Board Considers Service Agreement	January 20 & February 3, 2020

Project Scope

Task 1 Perform Organization Analysis on the Department of Public Works

- A.) Review job descriptions of current positions.
- B.) Meet with staff to better understand roles and services.
- C.) Research other comparable and neighboring municipalities to learn about services, staffing levels, work environment, and compensation.

- D.) Review equipment and vehicle fleet to perform current services.
- E.) Assess financial impact for increasing, decreasing or eliminating services.
- F.) Research industry standards, best practices, and trends in public works.
- G.) Obtain and review any service delivery feedback related to DPW services (i.e. emails, phone calls, social media, surveys, etc.).
- H.) Based on research and analysis, provide recommendations for the Village to consider (both short-term and long-term actions).
- I.) Other tasks as determined by consultant.

Task 2 Perform Organization Analysis on the Clerk and Customer Service Department

- A.) Review job descriptions of current positions.
- B.) Meet with staff to better understand roles and services.
- C.) Research other comparable and neighboring municipalities to learn about services, staffing levels, work environment, and compensation.
- D.) Review equipment to perform current services.
- E.) Assess financial impact for increasing, decreasing or eliminating services.
- F.) Research industry standards, best practices, and trends in election management, document management, parking administration, payment processing, and other customer service needs.
- G.) Obtain and review any service delivery feedback related to Clerk and Customer Services (i.e. emails, phone calls, social media, surveys, etc.).
- H.) Based on research and analysis, provide recommendations for the Village to consider (both short-term and long-term actions).
- I.) Other tasks as determined by consultant.

Task 3 Perform Organization Analysis on the Senior Resource Center

- A.) Review job descriptions of current positions.
- B.) Meet with staff, Elder Services Advisory Board, Shorewood Connects Coordinator, and other volunteers to better understand roles and services.
- C.) Research other comparable and neighboring municipalities to learn about services, staffing levels, work environment, and compensation.
- D.) Review equipment to perform current services.
- E.) Assess financial impact for increasing, decreasing or eliminating services.
- F.) Research industry standards, best practices, and trends in senior center services.
- G.) Obtain and review any service delivery feedback related to SRC services (i.e. emails, phone calls, social media, surveys, etc.).
- H.) Based on research and analysis, provide recommendations for the Village to consider (both short-term and long-term actions).]
- I.) Other tasks as determined by consultant.

Task 4 Complete Comprehensive Report Summarizing Research and Information

- A.) Provide all information gathered in tasks 1-3 in a comprehensive report.
- B.) Present findings to the Village Board during a public meeting. Report will be made accessible to the public.
- C.) Share a draft of the study and findings to Village staff prior to public presentation.

Task 5 Perform Organization Analysis for Shorewood Public Library (Optional)

- A.) Review job descriptions of current positions.
- B.) Meet with staff, Library Board members, and other volunteers involved with Friends of the Library to better understand roles and services.

- C.) Research other comparable and neighboring municipalities/libraries to learn about services, staffing levels, work environment, and compensation.
- D.) Review equipment to perform current services.
- E.) Assess financial impact for increasing, decreasing or eliminating services.
- F.) Research industry standards, best practices, and trends in public library services.
- G.) Obtain and review any service delivery feedback related to Library services (i.e. emails, phone calls, social media, surveys, etc.).
- H.) Based on research and analysis, provide recommendations for the Library Board to consider (both short-term and long-term actions).
- I.) Other tasks as determined by consultant.

Proposal Content

The proposal should not exceed ten (10) single-sided pages and should address the following:

- A.) Transmittal Information.
 - 1. Contractor's name, address, telephone number and contact person.
 - 2. Contractor's confirmation of understanding of the program and commitment to provide the appropriate personnel and equipment to perform the scope of services as defined in this document.

- B.) Approach.
 - 1. Provide a description of the anticipated services.
 - 2. Outline proposed staffing levels and activities.
 - 3. Specify methods to obtain information and research – especially with comparable and neighboring communities as well as service delivery feedback from community members.
 - 4. Identify approach for communication with staff and officials.
 - 5. Provide estimated hours for all tasks.

- C.) Contractor Experience.
 - 1. Professional registrations or certifications of managers and drivers.
 - 2. Description of related past experience, particularly experience of a similar capacity on projects of comparable size and/or scope.

- D.) Cost.
 - 1. Itemize costs based on each task and include a final cost for services.
 - 2. Please include a table such as the one illustrated in Attachment A.

- E.) Contract
 - 1. Please attach a copy of your standard contract (if available) for these types of services in the proposal.

- F.) Insurance
 - 1. The proposal must include either a description of the firm's insurance or a certificate of insurance outlining the firm's insurance policies which evidence compliance with the requirements noted in the *Terms and Conditions* section of this RFP.

- G.) Examples of Work
 - 1. Please provide up to three different examples of programs or services you've performed for other municipalities. The work should demonstrate a high quality service.

H.) References

1. Please provide references of current or previous clients you have worked with in the past.
2. It is highly recommended that at least one municipal reference be highlighted.

Terms and Conditions

Village Costs

The Village will pay the Service Provider for the services provided as described. Such payment shall be full compensation for all services rendered and for all supervision, labor, liability insurance, and other incidental costs.

Payment Terms

The Village will be responsible for following the payment schedule outlined by the selected Service Provider. Village will make payment as long as it received invoice at least thirty days prior to outlined payment schedule and Service Provider successfully completed services as outlined.

Insurance

The successful firm shall agree that it will, at all times during the term of the agreement, keep in force and effect insurance policies required by the contract, issued by a company or companies authorized to do business in the State of Wisconsin and satisfactory to the Village. Such insurance shall be primary. Prior to execution of the written contract, the successful firm shall furnish the Village with a Certificate of Insurance listing the Village as an additional insured and upon request, certified copies of the required insurance policies. The Certificate shall reference the contract and provide for thirty (30) days advance notice of cancellation or nonrenewal during the term of the agreement. Failure to submit an insurance certificate, as required, can make the contract voidable at the Village's discretion. Additionally, the Firm shall not allow any subcontractor to commence work until the aforementioned documents, where applicable, have been obtained from the subcontractor and approved by Village of Shorewood.

Nondiscrimination

In connection with the performance of work under this agreement, the Firm agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, marital status, sexual orientation, sex, disability, national origin or ancestry. This provision must be included in all subcontracts.

Assignment or Subcontract

The contract may not be assigned or subcontracted by the firm without the written consent of the Village. If all or a portion on the contract work is proposed to assigned or subcontracted, the name of the individual(s) to complete the work, address and firm proposed shall be submitted within the scope of the proposal.

Independent Contractor Status

The firm agrees that it is an independent Contractor with respect to the services provided pursuant to this agreement. Nothing in this agreement shall be considered to create the relationship of employer and employee between the parties.

Amendments to Contract

This contract may be modified only by written amendment to the contract, signed by both parties.

Waiver

One or more waivers by any party of any term of the contract will not be construed as a waiver of a subsequent breach of the same or any other term. The consent or approval given by any party with respect to any act by the

other party requiring such consent or approval shall not be deemed to waive the need for further consent or approval of any subsequent similar act by such party.

Indemnification and Defense of Suits

The firm agrees to indemnify, hold harmless, and defend the Village, its officers, agents and employees from any and all liability including claims, demands, damages, actions or causes of action, together with any and all losses, costs, or expense, including attorney fees, where such liability is founded upon or grows out of the acts, errors, or omissions of the firm, its employees, agents or subcontractors.

Contract Period and Termination of Contract

The contract period will for the duration of the requested services. The Village reserves the right to cancel this Agreement within (30) days written notice. If the Service Provider elects to cancel the Agreement, it must provide (30) days written notice and it must be mutual between the Village and the Service Provider. If the Service Provider cancels this Agreement after advance payment for services has been rendered per the terms, the Service Provider will only be compensated on a pro-rata basis for actual work performed, and any remaining advance payment will be returned to the Village.

Professional Services Contract

Should your proposal be accepted and a contract is issued, this Request for Proposal and all documents attached hereto including any amendments, the firm's technical and price proposals, and any other written offers/clarifications made by the firm and accepted by the Village, will be incorporated into a contract between the Village and the firm, it shall contain all the terms and conditions agreed on by the parties hereto, and no other agreement regarding the subject matter of this proposal shall be determined to exist or bind any of the parties hereto.

The submission of a proposal shall be considered as a representation that the firm has carefully investigated all conditions, has full knowledge of the scope, nature and quality of work required, and is familiar with all applicable State, Federal and Local regulations that affect, or may at some future date affect the performance of this contract.

Acceptance of this proposal will take place only upon award by the Village Board, execution of the contract by the proper Village officials, and delivery of the fully-executed contract to the firm. Acceptance may be revoked at any time prior to delivery of the fully-executed contract to the successful firm. The contract may be amended only by written agreement between the firm and the Village of Shorewood.

Selection Criteria

Village staff will consider the following in evaluation of the proposals:

1. Past record of performance of the consultant and team on similar projects based on references, work examples, and responses during the interview.
2. Quality and content of the written proposal.
3. Experience and technical competence of the consultant assigned to the program.
4. General understanding of agreement with the consultant's approach to the project, including the Village's confidence in the consultant's ability to satisfactorily perform the work.
5. Ability to perform the analysis within the necessary parameters.
6. Cost to execute services.

Instructions to Firms

Submittal Instructions

1. Please provide (1) digital copy of the proposal via email only to:
Project Manager: Tyler Burkart, Assistant Village Manager, Village of Shorewood
Email: tburkart@villageofshorewood.org
Identify proposal name into subject line of the email: Organization Analysis
Deadline: 4:00 p.m. CST, Friday, November 22, 2019
2. Proposals will be accepted on or before the deadline identified above. Proposals received after that date and time will be rejected. Proposals will not be opened publicly.
3. Questions regarding this RFP should only be directed to staff member identified above. Contact with elected officials, committee members and other staff members is grounds for disqualification.

This RFP does not commit the Village to award a contract, to pay any costs incurred in the preparation of a response to this request or to procure or contract for services or supplies. The Village reserves the right to accept or reject any or all proposals received as a result of this request, to waive minor irregularities in the procedure, to negotiate with any qualified source, or to cancel in part or in its entirety, this RFP, if it is in the best interest of the Village of Shorewood to do so.

Amendments

Amendment of proposals may be done as follows:

By Village: Proposals may be amended by the Village in response to need for further clarification, specifications and/or requirements changes, new opening date, etc. Copies of the amendment will be mailed to prospective vendors.

By Firm: Proposals may only be amended after receipt by the Village by submitting a later dated proposal that specifically states that it is amending an earlier proposal. No proposal may be amended after the opening date unless requested by the Village.

Proposals may be withdrawn only in total, and only by a written request to the Village prior to the time and date scheduled for opening of proposals.

Contract Administration

The staff member is the primary contact for contract administration of this proposal:

Tyler Burkart, Assistant Village Manager
tburkart@villageofshorewood.org
414-847-2705

In the absence of the primary contract, the secondary contract for contraction administration is:

Rebecca Ewald, Village Manager
rewald@villageofshorewood.org
414-847-2701



Request for Proposal – Issued 10/22/2019
ORGANIZATION ANALYSIS SERVICES
Village of Shorewood
Attachment A – Cost Sheet

Please provide the following details to inform the Village of estimated costs. Feel free to create your own cost sheet for ease of completion as long as it follows the format included below.

DPW	Staff	# of Hours	\$ / Hour	Cost
Review job descriptions				
Meet with staff and officials				
Research comparable communities				
Review equipment and vehicles				
Assess financial impact				
Research industry standards				
Obtain and review research/data				
Provide recommendations				
Total				

Clerk and Customer Service	Staff	# of Hours	\$ / Hour	Cost
Review job descriptions				
Meet with staff and officials				
Research comparable communities				
Review equipment and vehicles				
Assess financial impact				
Research industry standards				
Obtain and review research/data				
Provide recommendations				
Total				

Senior Resource Center	Staff	# of Hours	\$ / Hour	Cost
Review job descriptions				
Meet with staff and officials				
Research comparable communities				
Review equipment and vehicles				
Assess financial impact				
Research industry standards				
Obtain and review research/data				
Provide recommendations				
Total				

Comprehensive Report	Staff	# of Hours	\$ / Hour	Cost
Prove all information in report				
Present findings to the Village Board				
Share findings with staff in draft report				
Total				

Final Total for Required Services: _____

Library (Optional)	Staff	# of Hours	\$ / Hour	Cost
Review job descriptions				
Meet with staff and officials				
Research comparable communities				
Review equipment and vehicles				
Assess financial impact				
Research industry standards				
Obtain and review research/data				
Provide recommendations				
Total				